

## Job Description: Trust Officer

### About Forward Group

Forward Group is an owner-managed fiduciary business providing bespoke relationship-led solutions to private and institutional clients. The Company aspires to work with global law firms, accountancy firms, multinational corporations, financial institutions, high net worth individuals and family offices. We pride ourselves on putting the needs of our clients first by working with them and their advisers to meet their long-term aspirations and objectives. We believe that communication is key to every client relationship.

To achieve this, Forward Group operates a director-led business model ensuring the highest level of client service through experience, commitment and attention to detail.

### Overall Job Purpose

- This is a position requiring an ability to complete administrative tasks to a consistently high standard, within agreed timescales.
- The individual will have a demonstrated an enthusiasm to broaden their knowledge of company and trust administration, offshore products, services, legislation and regulatory issues.
- They will be seeking to expand their knowledge by means of formal study and on the job learning.

### Key Responsibilities

- Administer a varied portfolio taking responsibility for the proper performance of all necessary administration tasks required to comply with requirements of the client and relevant legislation Manage client relationships, attendance at meetings as appropriate including all preparation as necessary
- Ensure minutes and resolutions for entities under management (companies, trusts, foundations etc) are prepared as required
- Responsible to ensure statutory database/registers are maintained and up to date
- Preparation of correspondence in accordance with firm's procedures
- Ensure that all client requests / correspondence are dealt with in a prompt, professional and efficient manner
- Ensure that workloads are completed to a standard acceptable to the Senior Client Manager, and within agreed timescales.
- Complete client take-on documentation prior to commencing administration and liaise with relevant contact on hand-over of new clients



- Supervise and assist in the training of any Junior Administrator, Administrator within the team, providing regular information feedback and identifying any additional training needs to the relevant Senior Client Manager.
- Provide open and constructive feedback on allocated tasks and build relationships with other team members.
- General assistance with various projects as requested
- Achieve objectives set by senior members of staff and during the appraisal process.
- Be efficient with your knowledge of an understanding of Know Your Client ('KYC') policy and procedures in order to ensure absolute compliance with KYC procedures in order to maintain knowledge of the client business.
- Provide open and constructive feedback on allocated tasks and build relationships with other team members.

### **People & Team**

- Professional manner, demonstrating good interpersonal skills and ability to respond to the client needs
- Demonstrate a willingness to get involved in team issues and events.
- Ensure adherence to Forward Group values and operating terms of reference

### **Financials**

- Record time accurately and within deadline
- Meet productivity target and input timesheet daily

### **Skills & Expertise**

- Good organisational and time management skills applied to a fundamental knowledge of the mechanics of company and trust administration.
- Ability to take responsibility for the completion of work within the engagement while staying alert to potential issues that need disclosing to the Senior Client Manager.
- High level of diligence and care in all aspects of the job, and a willingness to check understanding of delegated tasks through questioning.
- An interest in financial services, and a genuine desire to learn how these can be used as tools for adding value to client's business.
- Positive attitude, demonstrating enthusiasm and the desire to take on responsibility.
- Manage own workloads and priorities and to work to specific deadlines as agreed with the Senior Client Manager.
- Produce work with a high level of accuracy and attention to detail.
- Situational understanding of needs of role and ability to find solutions/ more efficient ways of working within parameters
- Ability to work effectively in a team
- Experience with NavOne an advantage

### **Summary**

This is an exciting opportunity to be part of the Administration team at Forward. The ideal candidate will have a minimum of years experience and be someone who is a good team player. The successful candidate will be Forward thinking, understand and truly believe in our core values. We are a growing business and need people that are ready to grow with it, ready and willing to embrace change where needed.